DOCUMETRIXâ
EXPRESSô

Procedure

Quick Reference Guide

For

Electronic Document Workflow

Universal Systems Inc.

for Documetrix® Express™ Version 2.8

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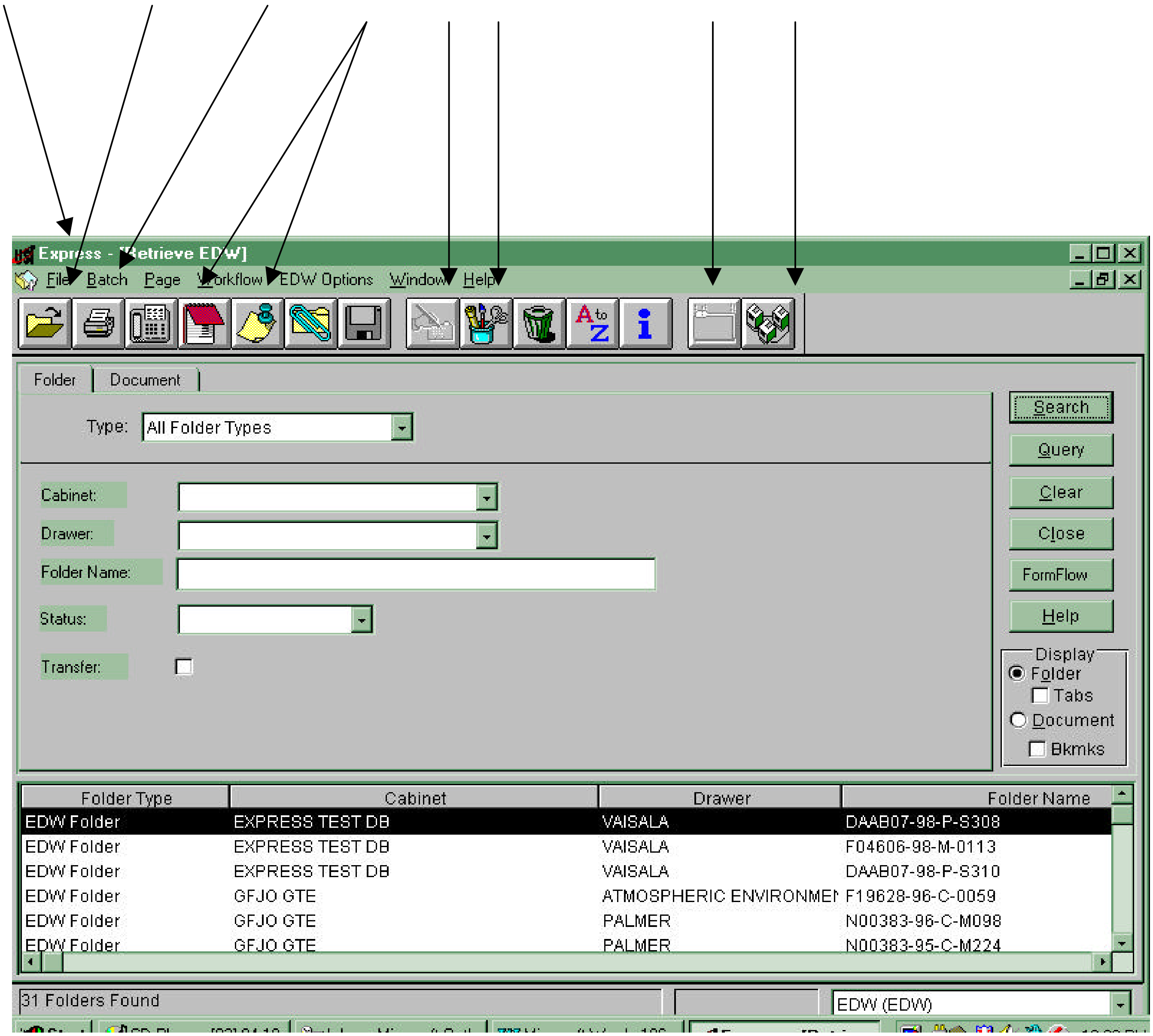
PROCEDURE QUICK REFERENCE GUIDE
CONTENTS

YOUR EXPRESS WINDOW OPTIONS

Getting Started with Electronic Document Workflow Exercise

Using your Express Training Guide, identify the tool bar buttons and their respective functions.



ADDING NEW USERS

WorkPlace Manager, Page ________

Before adding a new user, the WorkPlace Manger Server must be running:

Step 1. Logon to WorkPlace Manager.

Step 2. Select users and add from the left side of the window (people icon).

Step 3. Enter the appropriate information in all fields (name, department, etc.)

Step 4. Select the **User Availability** box to enable the user to logon.

Step 5. Select the **Groups** tab. Move all appropriate groups from the **Available** to the **Current** groups window.

Step 6. Select the **Workflow** tab, then check the **Workflow Enabled** box to enable the user to receive workflow routed documents and folders.

Step 7. ***OPEN EXPRESS APPLICATION BUILDER*** . You must ensure that new users are given access to the EDW application, folders, and documents.

Step 8. Under the **Maintenance** menu select **Application Security.**

Step 9. Choose new users from the **Available Users** window on the left and use the arrow button between the windows to add them to the **Current Users** window on the right

Step 10. Under the **Maintenance** menu, go to **Folder Type**. Move the user from the **Available Users** window on the left to the **Current Users** window on the right

Step 11. Under the **Maintenance** menu, go to **Document Type**. Move the user from the **Available Users** window on the left to the **Current Users** window on the right

Step 12. The new user is now set up to use EDW.

NOTE:

- New users will be prompted to change his/her password the first time they logon.
- If a new user is in a group(s) which have already been made available to the EDW application, folder type and document type(s), they do not need to be added individually.

EXPORTING DOCUMENTS

Express Client Training Guide, Page ___________

Exporting Documents: Is used when one needs to route contract documents to persons or companies that are not using EDW. Exporting the file/image enables you to attach it to an E-Mail or share it on a network drive.

Step 1. From File menu bar, select Retrieve Document.

Step 2. Search and select the folder or document type you are exporting. *Refer to your book for instructions if you do not know how to search for a particular folder or document.*

Step 3. From File menu bar, select Export Document. Enter appropriate information into the fields as open windows request.

Step 4. Browse your network for the directory to export that Folder or Document type.

Step 5. *Documents of various file formats may merely export (or be saved) to your LAN without displaying the two Export windows. You will, however, always have the Export windows when exporting TIFF images.*

Step 6. Once you have identified where to relocated the file you want to export, you should follow instructions finish exporting the documents.

INDEXING DOCUMENTS

Express Client Training Guide, Page ________

Indexing a Batch:

Step 1. Ensure that the correct application is selected in the lower right corner of the Express window.

Step 2. From Batch on the menu bar, select Index.

Step 3. Double click on the name of the batch you would like to index.

Step 4. Click on the Folder tab.

Step 5. Click the Create button in the Batch Index window. The Create Folder window will appear (shown on next page).

Step 6. From the drop-down list, choose the type of folder you would like to create or retrieve.

Step 7. Enter all required information into the various fields of the window. Remember, blue titled fields require indexing, all others are optional.

Step 8. Click the OK button after completion of indexing – not scanning.

IMPORTING DOCUMENTS

Express Client Training Guide, Page _________

Importing Documents: If you need to add a document to an existing folder, you may either add the file using its native application or add an image, processes referred to as Import or Soft Scan respectively. In either event, you must first find and open the folder, or create a new one, before you can add the document. During the soft scan or import process, always search for a previously created folder before creating a new one.

Step 1. From File on the menu bar, select Import Document.

Step 2. Select the Folder or Document type for the document you are importing. *Refer to previous instructions for creating folders if you need to create a new folder and are unsure how.*

Step 3. Enter the information into the required fields for that Folder or Document type.

Step 4. Click the Import button to bring the document into Express.

Step 5. Click the Browse button to find the file to import from your hard. Once you have located the file you want to import, double click to add it to the File selection field.

Step 6. Verify that the correct file name is the file selection field. If it is, press the Add button, then O.K. to complete the import.

Step 7. You will see a message that the file has been successfully imported and saved. You may close all windows at that time.

NOTE: If Express is unfamiliar with the type of file that you are trying to import, you will be prompted to specify what application your file is associated with. For example, if you are importing a Word document (*.doc) you must identify the winword.exe file on your computer.

INSERTING NEWLY INDEXED DOCUMENTS INTO WORKFLOW

Express Client Training Guide, Page _________

What it does	Inserts the most recently imported, scanned, or created document into the workflow.
Where to find it	Insert Item is accessed in the EDW Express Client, from the EDW Options menu item.
Who can use it	All EDW users.

Note: *This is similar to but distinct from the Insert Item option in the EDW Workflow menu. The Insert Item in the Workflow menu is used after retrieving a document, to route it into the workflow. The Insert Item in the EDW Options menu is used for newly entered documents.*

Use this function when you have just imported, scanned, or created a document, and you wish to insert it into the workflow.

To Insert a Newly Indexed Document:

Step 1. After the message stating that the import, create, or scan was successful, simply select the menu option EDW Options

Step 2. Click Insert Item.

Step 3. A message stating that the document was successfully inserted will appear.

Step 4. Click OK.

INSERTING RETRIEVED DOCUMENTS INTO WORKFLOW

Express User Guide, Page _________

What it does	Inserts a retrieved document into the workflow.
Where to find it	Insert Item is accessed in the EDW Express Client, from the **Workflow** menu item.
Who can use it	All EDW users.

To Insert a Retrieved Document Into Workflow:

Step 1. Select the contract **document** you want to insert into workflow.

Step 2. Select the **Workflow Menu, Insert Item** or click . ***NOTE****: The tool tip title is now Insert into workflow. Also note that the network button has a dual purpose depending upon whether you are in your In-Basket or at a document listing*

.

Step 3. If this document has previously been inserted into the workflow, confirm your intent to insert the last inputted item into workflow.

Step 4. After inserting into workflow, close all windows and return to the Express main window for the next operation.

MODIFYING INDEXING INFORMATION

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Modifying Indexing Information: If you have additional indexing information or notice a mis-filed document, you may complete the indexing and/or move the item to the correct folder.

Step 1. Open your work item.

Step 2. Minimize the work basket and document list windows.

Step 3. Select **File, Retrieve,** and search for and view the document.

Step 4. With the Retrieve window active, select **File, Modify** or click . The Modify Folder Information window opens.

Step 5. Edit the folder index information.

Step 6. If the document is also mis-filed, press the **Change Folder** button to move the document to the correct folder.

Step 7. Click OK to accept the changes.

Step 8. Close the Retrieve window.

MODIFYING WORKFLOWS

Systems Administrator Guide, Pages _____________

Modifying An Existing Workflow:

Step 1. **Shut down the WorkManager Server** for any changes to Decision Tasks, Broadcast Tasks, and Rendezvous tasks. Exit the Server completely; do not simply check the "disable" option.

Step 2. Make sure **no one else is modifying** the workflow at the same time. ***NOTE:*** *If two people modify a workflow at the same time, the last change will save. The other person's changes will be lost.*

Step 3. **Log into WorkManager Builder** with a sufficiently privileged account.

Step 4. Select from the main menu **Workflows : Flows**…

Step 5. Open the flow entitled **EDW**, or one of its subflows, as required.

Step 6. Refer to the System Administration documentation and the on-line help file for detailed information on modifying workflows.

Step 7. Make sure that you have connected all the nodes properly, with the arrows pointed in the proper direction. Drill down into all new or modified tasks to ensure that you have entered all the correct information.

Step 8. **Launch the WorkManager Server** when ready to test the modifications.

Step 9. Insert items into the modified workflow to **test** any changed decisions or paths.

Notes:

- If you are adding a new user to the workflow, you will first need to add the user account using WorkPlace Manager.
- Remember to include a **default path** for Decision Tasks.
- **If items get stuck** in the workflow, or do not go to the desired task, you can push them along by using the menu item **Resources + Reassign Work.** Select the items in question, reassign them to yourself (or another user), and them release them from your Express In Basket.

OFF-LINE ROUTING

Express Client Training Guide, Page _________

Routing a Copy Off-Line: Route a work item off line as a copy when ever you require additional information or guidance from another person. This copy has a mandatory reply by endorsement condition that must be met before you can release the work item from your In-Basket.

Step 1. Select the work item from your basket you want to address it to any user in the workflow.

Step 2. Select **Workflow, Off-Line** or click . The Off-Line Routing window opens.

Step 3. Select the **Users** radio button in the Addressee Filter area to display all users in the Available list.

Step 4. Select the **Copy** or **FYI** radio button.

Step 5. Select the user name and click the (») button to add user to the Copy or FYI list.

Step 6. Enter appropriate comments in the Comment text box.

Step 7. Click **O.K.** and **Yes** at the system prompt confirming the new off-line routing.

Routing a FYI Off-Line: Route a work item off line as a FYI (for your information) when ever you feel someone not on normal distribution or routing needs to know that this particular document exists. The address need only open the document to meet the action requirement. Follow **Steps 1 – 7** above for routing a Copy off-line.

SCANNING DOCUMENTS

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Scanning a Batch:

Step 1. Place the documents to be scanned in the scanner feeder.

Step 2. From Batch on the menu bar, select Scan.

Step 3. Add this as a new batch by selecting File from the menu bar and then choosing Add.

Step 4. Give the new batch a name by typing the name in the New Batch window and clicking OK.

Step 5. Select the options you prefer in the Scan Control Window, then click the Scan button.

Step 6. Once the scan has completed, click Done.

Step 7. You must now assign a status to the batch. If you have no more documents to scan with this batch, select Scan Complete. Otherwise, select Scan Incomplete. Then click the Close button.

NOTE: During various stages of the scanning process, certain windows (i.e. the Scan Control window) may become inactive or minimized. If you can not see a particular window discussed in one of the scanning steps, check the Windows Status bar at the bottom of your screen. To access those applications/windows, click on the icon for the window you need.

SCANNING SINGLE DOCUMENTS

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Interactive Scanning:

Step 1. Place the document into the scanner feeder tray.

Step 2. From File on the menu bar, select Interactive Scan.

Step 3. Click on the Folder tab and complete required fields as a minimum.

Step 4. Click the Document tab and complete required fields plus as much information as is available. (Additional information may be added later if necessary.)

Step 5. Click on the Folder tab and either search for or create a new folder to file the new document. (All documents must be filed somewhere.)

Step 6. Switch to the Scan Control Window (Alt + Tab).

Step 7. Click on scan options such as Auto Scan (all pages) vs one at a time, Single-sided, etc., then click the Scan button.

Step 8. Click Done once the scanning is complete.

Step 9. Press Alt + Tab to return to the Express Interactive Scan window.

Step 10. Click the Save button to save the information.

Step 11. Click Yes to confirm changes to the file and click Close to close the Interactive Scan window. (This automatically closes the Scan Control window as well.)

NOTE: During various stages of the scanning process, certain windows (i.e. the Scan Control window) may become inactive or minimized. If you can not see a particular window discussed in one of the scanning steps, check the Windows Status bar at the bottom of your screen. To access those applications/windows, click on the icon for the window you need.

SOFT SCANNING ELECTRONIC FILES

Express Client System User's Training Guide, Page _________

Soft Scan Electronic File Formats: Soft scanning prints an electronic file/document into Express as a scanned TIFF image. You may soft scan screens from a mainframe, MS Word, MOCAS, Form Flow, Alerts, the WWW, or any other business related application. If you need to add a contract-related document to an existing folder that should not be changed, then Soft Scan is process you will use. During soft scanning, remember that you must always search for an existing contract folder before creating a new one. Soft scan your electronic file as follows:

Step 1. From the Express **File** menu, choose **Import Document**.

Step 2. Index all fields on the **Folder** and **Document** tabs. The blue titled fields are mandatory data entry fields. If you are unable to begin soft scan, read the error message and Express will tell you which field(s) you must index before proceeding to Step 3.

Step 3. Press the **Soft Scan** button on the right hand side of the screen.

NOTE: At this point the soft scan dialog box will appear telling you to switch to the Windows application that contains the electronic file you will soft scan. For example: You wrote a letter to a contractor in MS Word, or you created a schedule in MS Excel, simply open MS Word or Excel.

Step 4. Using the native application, open the desired file and select **Print** from the **File** menu.

*NOTE: Ensure that the **CANGRAPH NT 1.0** printer is the selected printer and click **OK**. If it is not, select it from your printer drop down list and click OK**.***

If the Print to File dialog box appears, proceed to Step 5, if not, proceed to Step 6.

Step 5. Select "all files" from the drop down list in the Save as Type box. Click in the file name field and name your file appropriately with a **.tif** file extension. Select the drive and folder location to store the file, then click OK and wait for the operation to process.

NOTE: If you are dealing with an Excel spreadsheet file or Adobe Acrobat file (.xls or *.pdf) you will be prompted for an output filename. Enter the path where the file should be saved and give the file a name. An example is: **D:\Temp\index.tif;** keep in mind the image is going to be a scanned image, not a spreadsheet or form.*

Step 6. After the file has stopped spooling, Express will switch from your Windows application to Imagenation and it will display your scanned document. Switch back to the **Soft Scan** window. This may be accomplished by choosing the **Soft Scan button** on your Window's taskbar or by using the **Alt+Tab** key combination.

Press the **Finish** button on the **Soft Scan** window. The "file(s) have been imported and saved" message will appear to notify you the operation is successful. The Soft Scan is now complete.

SEARCHING FOR A FOLDER OR DOCUMENT

Express Client Training Guide, Pages __________

Searching For A Folder: If you need to use a document in an existing folder, you may search for either the folder or a particular document type by merely selecting the radio button for what you intend to retrieve.

Step 1. Select **File, Retrieve** to begin the search process.

Step 2. Select the folder type from the **Folder Type** drop down list.

Step 3. Select the **Folder or Document** radio button along the right side of the screen to define your search to which ever you are trying to retrieve.

Step 4. Enter some index information for the folder:

- The contract, program, vendor, etc.
- If uncertain about spelling or the entire number, add a wild card to the search (%).

Step 5. Click Search. The Retrieve-Import External Document Search Mode window opens displaying your search results.

Step 6. If no folder or document was found, redefine your search criteria.

Step 7. Double-click on the folder to open. The document information is automatically updated.

VIEWING DOCUMENTS WITH SPICER IMAGENATION

SELECTING VIEWING PREFERENCES

Selecting And Saving Viewing Preferences:

Step 1. Select **File, Retrieve, Search,** and View a document in Imagenation.

Step 2. From the main menu, select **Preferences, View Preferences**.

Step 3. Set your preferences such as:

- Maximize the viewer. Exception: if you use the viewer side-by-side with MOCAS.
- Under Scale, select Horizontal Fit.
- Under Center, select the top center box.

Step 4. Click the **Save** button.

Step 5. Click **OK**.

***NOTE*:** *Some preferences may not take effect until the application is closed and launched again, others will be readily available.*

VIEWING MULTIPLE APPLICATIONS/RESIZING WINDOWS

General Windows Information

Resizing Two or More Applications for Split Screen Viewing:

Step 1. Activate and minimize all Applications you want to view at the same time.

Step 2. On the Windows status bar at the bottom of your CRT, right click your mouse. *Select the instructions for your viewing preference/tiling of all open windows applications.*

Step 3. If working with **MOCAS** is a requirement, then you may elect to resize the windows manually or switch to MOCAS, CARC, or another application by pressing **A*lt + Tab*** to toggle between all open applications.

Step 4. Resize the application and drag and drop it in the upper left corner of the screen.

Step 5. Alt + Tab to switch back to DMX Express. Resize this application as well. Repeat steps 2 – 4 until all applications are open, resized, and visible at the same time.

NOTE: *The active application will always have the colored title bar, all other applications will have gray title bars. To switch, click anywhere within a window of the application you want to use next. Only one window will be active at a time.*

VIEWING MULTIPLE CONTRACTS USING IMAGENATION

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Viewing Multiple Contracts Simultaneously:

Step 1. From the Express main menu select **File, Options**.

Step 2. On the Retrieve tab, check the box **Multiple Viewers**.

Step 3. Click **OK**.

Step 4. Retrieve the first document, and view it.

Step 5. Retrieve the second document. It will appear in an additional Imagenation window.

Step 6. Use the **Windows menu** in Imagenation to tile or display the documents to your liking.

Step 7. Special **Zoom** key strokes to enhance text:

- Press F-11 for the Details magnification window.
- Press Control + F-11 to freeze the Details window while you review the contract.
- Right click and draw a box around very small text to super zoom in on text.

Step 8. Select **File, Exit** when finished viewing contracts

WORKING WITH YOUR IN-BASKET

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Working With Your In-Basket:

Step 1. From File on the menu bar, select Select Workflow, Open Basket. The Basket Selection window opens.

Step 2. Click on the basket(s) to open. *You may select multiple baskets by pressing control and clicking on all baskets to open at the same time.*

Step 3. Select O.K. then review/complete work in your In-Basket.

Closing Your Basket(s):

Step 4. Activate the basket to close.

Step 5. Click the Close Button or Windows 95 x to close the basket.

Refreshing Your Basket(s):

Step 6. Update the basket you may have open and be working within by selecting Workflow, Options, and Refresh Basket. *The basket with update all database changes.*

Release Work Items From Your Basket(s):

Step 7. When all processing of the work item is completed, release the document to the next workflow distribution.

Step 8. Click the yellow Release button, or select Workflow, release and the item will be sent to the next assignee.

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